

Case Study

Kennissetwerk Detailhandel

DEVELOPING OBJECTIVE DECISION SUPPORT INSTRUMENTS FOR RETAIL IN FLANDERS

About

The 'Kennissetwerk Detailhandel' is a shared initiative from the 5 Flemish provinces. This initiative aims to provide a platform that shares all relevant information with regards to retail in Flanders.

Challenge

The Flemish Government formulated clear intentions with regards to **restoring the retail balance between city centres and peripheral regions**. In order to be able to support cities and municipalities to carry out a well-balanced policy, the 'Kennissetwerk Detailhandel' expressed their need for **tools, instruments and material with objective data facts about retail in Flanders**.

Approach

In a first phase, the **data needs** were assessed. What data is needed in order to be able to capture as much as possible about retail in Flanders today. Three data pillars were identified: data about **retail demand**, data about **retail supply** and data about **consumers' buying behaviour**. Retail demand data was gathered at the government's side, Locatus served as a partner for data on the supply in retail and MAS performed a telephone survey with 30.000 respondents in order to gather data about buying behaviour. We helped MAS in setting up this telephone survey such that the necessary data requirements were met.

All **datasets** were **gathered** and integrated in one large database in a second phase. Subsequently, the datasets were **analysed** and the relevant **key figures** were defined.

In a third phase, **all key figures** were calculated for all 308 cities in Flanders and on province level for all 5 provinces. All figures were **structured in a summarising report**, providing clear tables and clarifying visualisations on maps.

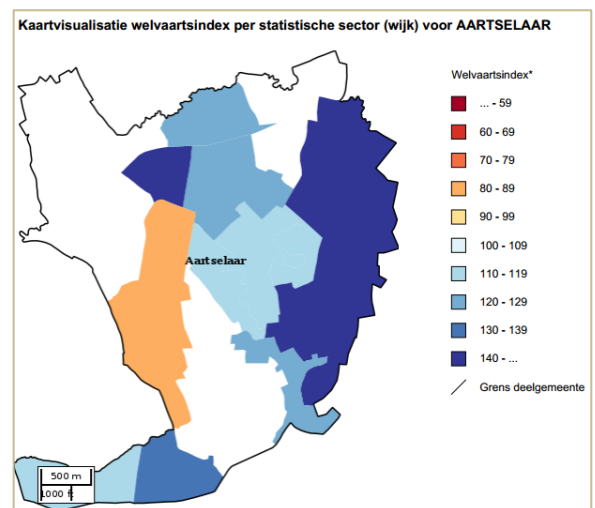


Figure 1: Visualisation of revenue index per statistical sector for Aartselaar

Winkelaanbod en branchemix per winkelgebied van AARTSELAAR							
WINKELGEBIEDEN	WINKELS	WVO	%LEEGSTAND (*)	%DAGELIJKE	%PERIODIEKE	%UITZONDERLIJKE	%OV. DETAIL (**)
			(in % WVO)	(in % WVO)	(in % WVO)	(in % WVO)	(in % WVO)
Baanconcentratie A12 Aartselaar Noord	70	31 939 m ²	2,9%	-	35,5%	52,8%	5,7%
Verspreide bewoning Aartselaar	65	8 400 m ²	7,3%	13,0%	10,9%	68,8%	-
Centrum Aartselaar	98	5 601 m ²	17,7%	47,8%	25,4%	6,9%	2,6%
TOTAAL AARTSELAAR	233	45 941 m ²	5,5%	8,2%	31,9%	50,1%	4,3%

(*) Leegstandoppervlakte voor niet-detailhandel bedraagt één derde van de totale leegstandoppervlakte volgens assumpties genomen door LOCATUS.
(**) Overige detailhandel

Bron: LOCATUS (september 2014); verwerkt door Geo Intelligence

Figure 2: Shop supply per retail sector per shopping area in Aartselaar

These first three phases were necessary to get insight in the current situation about retail and buying behaviour in Flanders. In a next stage, **relations** between all these datasets were investigated. This way, all parameters defining buying behaviour per retail sector could be identified.

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All of these parameters were incorporated in a predictive model, allowing to estimate with high precision the size and spread of the trade area of shopping areas in Flanders. Also potential and cannibalisation of future retail projects can be assessed with the model.

Results

The first three phases resulted in **clear and concise fact reports** for all municipalities in Flanders. These reports are free for download through this link:

<http://www.detailhandelvlaanderen.be/gemeenten-en-provincies/gemeenten>.

These fact reports are **updated** on a **yearly** basis such that the 'Kennisnetwerk Detailhandel' is able to monitor evolutions and provide the most recent information at any time.

All datasets and the predictive model were integrated in the **webbased platform 'RetailSonar'**. This platform allows for quick but in depth analyses of the impact of new retail developments on surrounding cities and municipalities and precise estimations of the trade areas of all shopping areas in Flanders.

Currently, we're working on a **framework** on how this platform can be **used most efficiently and correctly** in order to support local governments and advisors in dealing with their retail challenges.

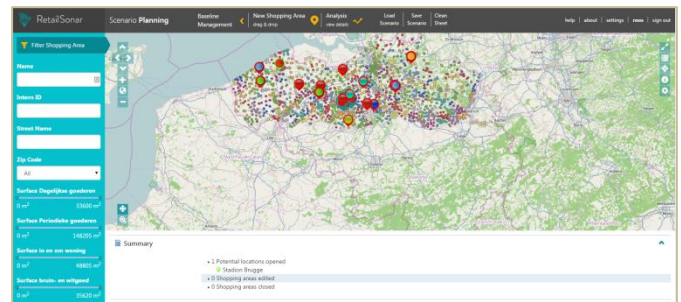


Figure 3: screenshot from RetailSonar platform

DETAILED RESULTS BASED UPON THE BASELINE SALES				BASELINE TURNOVER: 197.472 Feq	
City	Families	Revenue Factor	Potential	Baseline Reach	Baseline Market Share
41002 AALST (7.94 min)	35.793	112,61	77.994 Feq	57.041 Feq	73,14%
23105 AFFLIGEM (11.38 min)	4.940	144,57	10.956 Feq	7.512 Feq	68,57%
41082 ERPE-MERE (10.68 min)	7.984	121,11	18.098 Feq	10.734 Feq	59,31%
41024 HAALERT (12.60 min)	7.465	111,59	16.320 Feq	8.973 Feq	54,98%
41034 LEDE (12.58 min)	7.398	116,11	17.196 Feq	9.149 Feq	53,20%
23086 TERNAT (16.25 min)	5.981	132,38	11.084 Feq	4.947 Feq	44,63%
41011 DENDERLEEUV (11.57 min)	7.717	107,27	17.582 Feq	7.637 Feq	43,44%
41063 SINT-LIEVENS-HOUTEM (17.98 min)	3.952	112,91	9.492 Feq	2.940 Feq	30,97%
42026 WICHELEN (18.18 min)	4.775	113,2	10.046 Feq	3.051 Feq	30,37%
23044 LIEDEKERKE (17.94 min)	5.042	125,48	11.382 Feq	3.372 Feq	29,63%
23060 OPWIJK (21.12 min)	5.381	127,41	12.530 Feq	3.648 Feq	29,11%
41027 HERZELE (21.62 min)	7.006	122,36	16.048 Feq	4.615 Feq	28,76%
23002 ASSE (19.92 min)	12.555	132,43	24.682 Feq	6.666 Feq	27,01%
23097 ROOSDAAL (21.75 min)	4.274	127,33	9.032 Feq	2.186 Feq	24,20%
41048 NINOVE (19.60 min)	15.467	117,85	34.006 Feq	7.279 Feq	21,41%
42003 BERLARE (27.25 min)	6.053	100,59	14.138 Feq	2.848 Feq	20,14%
42011 LEBBEKE (22.56 min)	7.559	114,53	17.336 Feq	3.378 Feq	19,49%
23104 LENNIK (26.72 min)	3.491	143,43	6.356 Feq	1.237 Feq	19,46%
23016 DILBEEK (23.38 min)	16.249	135,53	19.350 Feq	3.703 Feq	19,14%
23024 GOOIK (24.73 min)	3.486	131,37	7.374 Feq	1.386 Feq	18,80%

Figure 4: Table with trade area results for periodic buying at Centrum Aalst

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